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ABSTRACT

A systematic review and critique of the work of midlife researchers and theorists such as Gould, Vaillant, Jung, Newman and Levinson, among others, indicates that: (1) a midlife transition period exists from approximately 35 to 55 and lasts as many as 10 years for both men and women; (2) a series of unique and fundamental biological, psychosocial, interpersonal, and developmental tasks occur during midlife transition; (3) a major reassessment of personal functioning, primary relationships, and the world of work often occurs in this period; and (4) the emergence at midlife of the expressive parts of the personality for men and the instrumental components for women represents a major source of personal and marital stress. (Author)

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GENDER AND ADULT MID-LIFE DEVELOPMENT: CRITICAL APPRAISAL*

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Introduction

Interest in adult development and life cycle research and theory has increased dramatically. Handbooks, whole issues of journals, review texts, self-help books and training manuals (e.g. Baltes and Schaie, 1973; Datan and Ginsberg, 1975; Eisdorfer and Lawton, 1975; Daedalus, 1975; Counseling Psychologist, 1976; Knox, 1977; McCoy et al, 1978; Troll, 1975) have been published recently and workshops are announced weekly.

For a variety of theoretical, cultural, demographic and perhaps "cult" reasons, mid-life adult development, particularly the "mid-life crisis," has recently become popularized. Given the amount of interest in the area, a systematic and critical appraisal of the substantive basis for these developments is in order. The purpose of this paper is to critically review existing and current theory and research on mid-life adult development from the vantage point of methodological soundness, commonalities in theoretical propositions, as well as clinical and empirical findings, and implications for further research and theory, with particular emphasis on sex differences. Our primary concerns are with the questions of how solid the theoretical and information base underlying current views of male and female mid-life development is and of what implications can be drawn from the current state of knowledge.

Specifically, this paper will address the following interrelated questions:

1. How complete are published reports, and what evidence is there for the validity of current theory and research findings on adult mid-life development?
2. What consistent developmental tasks, themes and issues can be identified generally and by gender?
3. What are the limitations of this current knowledge?
4. What are the most pressing and interesting research and theoretical questions?

We shall proceed first by critically reviewing published theoretical and empirical work on gender and mid-life. Based on this review as well as on our own preliminary interview data, various limitations and consistencies will be summarized in the form of several interrelated themes. Finally, important research needs and implications will be identified.

Procedures

Our initial focus is on the work of major theorists and researchers in the area of adult development with particular emphasis on mid-life. Our review will therefore center on the work of the following, among others: Bardwick (1970, 1971, 1974); Brim (1966, 1968, 1976); Erikson (1959, 1963, 1968a, 1968b); Fleck (1977); Freud (1965); Gould (1973); Gutmann (1964, 1975, 1976a, 1976b); Horney (1967); Jacques (1965); C. Jung (1957, 1969); E. Jung (1969); Levinson et al (1974, 1976a, 1976b, 1976c, 1978a, 1978b); Lowenthal et al (1971, 1972, 1973, 1975, 1976); Neugarten et al (1964, 1968, 1969, 1972, 1973, 1976); Neumann (1959); Vaillant (1977a, 1977b); Wolff (1956).

These published works were independently reviewed by at least two members of the research team with two broad sets of criteria in mind:

1. Completeness of information in the published document.
2. Quality of the research and/or scholarship.

The completeness of information criteria were:

1. Data collection techniques, training, instruments, and their properties. (e.g. reliability, validity, etc.) clearly described (if appropriate)
2. Sample, sampling techniques and settings specified and described.
3. Data analyses and reduction procedures presented (if used).
4. Theoretical propositions and hypotheses (if relevant) clearly stated.

The quality criteria were:

1. Adequacy of sample size, composition and source (sampling techniques, random vs. non-random, etc.).
2. Adequacy and appropriateness of data collection procedures and instrumentation (e.g. pretest, training, reliability and validity data adequate, etc.).
3. Appropriateness of statistical analyses.
4. Connection between theoretical propositions and hypotheses, clear and appropriate.
5. Extent to which the conclusions are justified by the actual findings.

(Sample completeness and quality rating forms can be found in Appendix A.)

The level of inter-judge agreement for the completeness of information and the quality criteria for each pair of the two review teams were determined using Kappa (Cohen, 1968; Barttko and Carpenter, 1976). Inter-rater agreement for completeness and quality ratings for the two teams as determind by Kappa

ranged from .68 to 1.00, all highly significant and satisfactory for our purposes.

Simultaneously, each reviewer summarized each reference in terms of the following major categories where such information was available:

1. Methodology (sample, data collection, data analyses).
2. Main theoretical propositions.
3. Stages/Transitions (biological, psychosocial, systems themes, developmental tasks).
4. Sex differences.
5. Outcomes.
6. Supportive and/or contradictory empirical evidence.
7. Research and intervention implications.

A sample of a completed protocol (Neugarten et al, 1964, 1968) can be found in Appendix B. These protocols served as the basic data for the review and integrative efforts which follow. The next section will focus on:

1. The methodological strengths and limitations of work in the area to date.
2. Some consistent and interesting theorizing and data on sex differences in mid-life development.
3. Several implications for required future interventions and research.

Analysis of Published Literature in Gender and Mid-Life

1. Methodological Considerations

Our review of the literature bearing on gender and mid-life encompassed more than 50 primary and secondary sources. Although some of the major researchers and theorists in the field have employed systematic data collection procedures and fairly large samples, with few exceptions (e.g. Neugarten et al, 1964, 1968; Vaillant, 1977b) the major and influential work in the area has been of a more clinical and/or descriptive nature.

Chart I below, summarizes data collection procedures and samples identified in a subset of selected primary sources. As can be seen from this chart, only eight authors (Gould, 1972; Gutmann, 1976; Levinson et al, 1978b; Lowenthal et al, 1976; Sheehy, 1974; Neugarten et al, 1964, 1968; Vaillant, 1977a, 1977b; and Stein et al, 1978) describe their data collection procedures and identify their samples. The remaining studies (Brim, 1977; Erikson, 1959, 1963; Horney, 1967; Jacques, 1965; Jung, C., 1969; Jung, E., 1969; Neumann, 1959; and Wolff, 1956), though rich in insights which can be tested in a more systematic manner,

are largely based on clinical observation and/or theoretical speculation, with unspecified samples suggesting limitations to their generalizability.

In terms of data collection procedures, observational, interview, self-assessment, questionnaire and projective test techniques are the most common research methods employed in the area. Although researchers such as Gould (1972), Gutmann (1976), Levinson et al (1978b) Lowenthal et al (1976), Neugarten et al (1964, 1968) and Vaillant (1977a, 1977b) used systematic interview procedures, questionnaires, biographies and the like, as Brim (1977) and others have pointed out, more systematic empirical methods and designs have not been successfully adapted to the study of the complexity of mid-life adult development. This remains a persistent dilemma for mid-life studies as well as for adult development research in general.

Finally, we should note that studies which have employed more systematic data collection procedures (e.g. interviews, questionnaires or projective tests) generally have either failed to report or test the measurement characteristics (e.g. reliability, validity, etc.) of their data gathering procedures, or their sampling procedures reflect systematic biases (e.g. Gould, 1972; Levinson et al, 1978b; Vaillant, 1977a, 1977b).

Although these and related methodological limitations raise serious questions about the generalizability of these studies and their findings, it is important to emphasize that the systematic study of adult development, and, in particular mid-life, is in its infancy, and that certain consistent and useful themes, issues, and conclusions can still be identified with varying degrees of certainty. These are considered next.

Chart 1

SELECTED PRIMARY SOURCES

Quantitative/Descriptive Studies			Theoretical/Clinical Studies		
Author	Data Collection Procedures	Sample	Author	Data Collection Procedures	Sample
Gould 1972	Part I: Group sessions observed by psychiatrists, psychologists and an anthropologist	1968 UCLA Outpatient Clinic patients 7 age groups	Brim, 1977	Theoretical review	
			Erikson, 1959, 1963	Clinical observation and theoretical speculation	Unspecified
	Part II: Questionnaire surveying: sense of time; relations to parents, friends, children and spouses; feelings re: own personality, job, sex, career; ranking of major life concerns and people in relation to companionship, decision-making and incluence	524 men and women, middle class, white, educated non-patients	Horney, 1967	Clinical observation and theoretical speculation	Unspecified
			Jaques, 1965	Clinical observation and study of creative genius	Unspecified
Gutmann 1976	Open-ended, semi-structured interviews and projectives (TAT)	Adult males and females in Kansas City (distributed by age, class) plus Arizona Navajo, Maja of Mexico, Druze of Middle East	Jung, Carl 1969	Clinical observation and theoretical speculation	Unspecified
			Jung, Emma 1969	Clinical observation and theoretical speculation	Unspecified
			Neumann, E. 1959	Clinical observations and theoretical speculation	Unspecified
			Wolff, T. 1956	Clinical observation and theoretical speculation	Unspecified

Levinson et al 1976, 1978b	Biographies, in-depth interviews: 10-20 hours over 2-3 months plus 2-year follow-up	40 men, aged 35-45 in 4 occupational groups; blue and white collar workers in industry, business executives, academic biologists and novelists
Lowenthal et al 1976	In-depth interviews, self-reports, WAIS, TAT, adjective ratings and self-assessment	216 men and women mostly white, representing 4 age groups; 25 males, 27 females, aged 16-18; 25 males, 25 females, newlyweds, aged 20-38; 27 males, 27 females, average age of 50; 30 males, 30 females, pre-retirees

Chart I, cont'd.

Chart I, cont'd.

Sheehy, G. 1974	Biographies, interviews, self-assessments	115 men and women, 18-55, mostly white middle class
Neugarten et al 1964, 1968	Interviews, projectives	Over 2000 normal adults, ages 40-90
Vaillant, 1977a, 1977b	Physical exams, psychiatric interviews, psychological tests, (including TAT), measuring adult adjustment scale, marital happiness scale, childhood environment scale, maturity of defense	268 Harvard 1942, 1943 1944 graduates reduced to 94; all white; 80% Protestant 10% Catholic, 10% Jewish
Stein, et al 1978	Questionnaire covering sense of self, relationships to parents, friends and children; feelings about passage of time, marriage, sex, career and leisure time	193 outpatient and 136 non-patients divided by age: 18-21 yr; 22-28; 29-36; 37-43; 44-50; 51-60

2. Theoretical and Empirical Considerations

Our review has suggested a number of interesting theoretical and empirical considerations and consistencies. These will be discussed in the form of a series of interrelated questions.

A. Can an age-specific, time-limited, inevitable mid-life transition/crisis be reliably identified?

There is some evidence, largely clinical, or low-level descriptive, but not necessarily empirical, to document the existence of a mid-life transition period which is often of particular difficulty or stress in predominantly middle class white men, (Levinson, 1978b; Gould, 1972; Sheehy, 1974). Some cross cultural validation for this notion is available (Gutmann, 1976). A less-well demarcated transition phase can be identified for women in several of the studies reviewed. (Neugarten et al, 1964, 1968; Neumann, 1959). Systematic studies of mid-life minority men and women and of variations by social class remain to be carried out. Therefore, the question of generalizability is premature.

The question of age-specific generalizable time boundaries demarcating the mid-life transition and for adult development in general remains more problematic. Several theorists and researchers reflecting different orientations have identified inevitable and specific ages for various sequential developmental periods (e.g. Gould, 1972; Levinson et al, 1978b; Neumann, 1959; Vaillant, 1977a, 1977b). Chart II briefly summarizes the stages, age boundaries, themes and developmental tasks identified by each of the above authors.

CHART II
STAGES/TRANSITIONS BY SELECTED AUTHORS

Stage Titles	Ages	Themes for Each Stage			Developmental Tasks for Each Stage		
		Biological	Psychosocial	Systems	Biological	Psychosocial	Systems
GOULD, R. (1972)							
	16-18		Getting away from parents. Peer group key influence.				
	18-21		Strong pull between individual and family/ peer systems			Need to keep "lid" on emotional tone	Must establish self as own person
	22-28		Autonomous Confident Unquestioning re feelings about self which are well-defined	Established in own social system Separate from family and early peer groups		Emphasis on modulating the emotional tone	Must make the efforts to "learn" proper adult tone Must establish marriage and career pattern
	29-34	Beginning deterioration of some general physical abilities	Begin to have existential questions about meaning of life Some inner aspect striving to be accounted for	Marriage and career established No longer feel need to separate from parents May see temporary identification with children		Wish to be accepted "for what I am"	Wish to accept children for what they are becoming

Chart II (Cont'd.)

GOULD, R.	35–43		Intensified inward direction Questioning of self, values Awareness of time squeeze	"muffled" renewal of old parent/child conflict lines Blurring of self-definition with family; focus on family rather than on other social contacts		see time as finite; emphasis on past, present, future	Work is important. Last chance to "make it big" Difficulty in communicating with spouse must be overcome Need to work to help marriage grow
	43–50		Pervasive negative attitude toward self and others; Realization that dream won't happen Look for someone to blame	Seek support, affection from spouse More interest in outside (though superficial) social contacts Somewhat negative and competitive Increased dependency on spouse		Develop sense of reality re time	Critical of children's adult development
	50 +	Concentration on health topics	Mellowing, negative stage over; self accepting Inner directed	Children seen as potential sources of satisfaction Spouse valued as companion Narrow time frame Little concern with past or future			Personal relationships sought

CHART II (Cont'd.)

STAGES/TRANSITIONS

Stage Titles	Ages	Themes for Each Stage			Developmental Tasks for Each Stage		
		Biological	Psychosocial	Systems	Biological	Psychosocial	Systems
LEVINSON ET AL (1978b)							
Leaving the Family (LF)	16-18 20-24		Separation gain autonomy	Transition from family system to broader social system		Separate from family - Financially less dependent Increase in self-parent differentiation (Identity vs. role diffusion) Family vs. Adult	Assume new roles in broader system Explore new living arrangements- Become part of the world - Broaden social skills Beginning of exploration and forming of tentative work and pairing choices. World ...

CHART II (Cont'd.)

LEVINSON ET AL. (1978b)					
Getting into the adult world. (G I A W)	early 20's to 27-29	Exploration and commitment	Sense of broader membership and responsibility in personal and work relationships	Establish occupational trends- adult friendships Involvement in sexual relationships, persistence in following the Dream (Intimacy vs. aloneness)	Integrate self and society- Transition to period of settling down- Make and firmup initial choices-
				Fashion an initial life structure including	
Settling Down (SD)	early 30's to mid 30's	Commitment Investment in career and family or other relationships	Integrate family, work membership and relationships	Deepen commitments - Pursue longer range goals - Establish order, stability, security and control in one's life - Planning, striving, move on and upward.	Invest more of self in work, family, and valued interests. Develop niche in society.
				Cope with antithesis - to be free, unfettered, not tied to any structure no matter how great its rewards, how great its current satisfactions, nor how alluring its future promise, ready to soar, wander, quest in all directions as the spirit moves one.	

CHART II (cont'd.)

LEVINSON ET AL (1978b)				
Becoming One's Own Man. (B O O M)	35-39 40-42	Dissatisfaction search for true autonomy Sense of constraint and depression	Stress in family, work, friends. Control of self control of enterprise Decision making Delegation	Seek independence and recognition particularly in the work world. Mentor/mentee relationship Become generative in relation to adults. Taking responsibility in the adult world. (Generativity vs. stagnation)
Mid-Life Transition (M L T)	early 40's to mid to late 40's	Boundary period between two periods of greater stability. Reassess goodness of fit between the current life structure and the self and the hope for the future.		Question life structure and modify or drastically change the structure - Sense of bodily decline - Recognition of one's mortality - Confront and deal with the illusions of omnipotence - Encounter the sense of aging and time running out - (The Jungian concepts of puer and senex as archtypes) - The Polarity of Masculine/ Feminine components of personality begins to press -
Restabilization the beginning of middle adulthood			**RESTABILIZATION**	

Chart II (Cont'd.)

NEUMANN, E. (1959)						
Psychic Unity	Birth-6-9 mo.		Primary identification with maternal uroboros and the "Great Mother".	Personal: mother/child Archetypal: "Great Mother"/child		
Self-Conserving (or Self-Establishing)	1-5 yr.		matriarchal consciousness	Personal: mother and/or female group archetypal: "Great Mother"/daughter		
Invasion of the Paternal Uroboros	5-13 yr.		Paternal Uroboros and the "Great Father"	Personal: father/daughter archetypal: "Great Father"/daughter		
Patriarchate	15-30 yr.		Masculine appear in individual and personal form, as man and animus	Personal: man/woman Archetypal: animus/woman		
Confrontation	35-40 yr.		Quaternio phase: fourfold relationship emerges with the integration of the contrasexual opposite.	Personal: man and woman relate as integrated wholes Archetypal: Quaternio (differentiated self)		marriage
Individuation	35-40 yr.					marriage

VAILLANT (1977a, 1977b)						
Adolescence	to age 20		Quest for identity		To internalize those we love	To achieve identity distinct from parents
Intimacy	20–30		conflicts re success	Careers started; wives; friendships	To win autonomy from parents, and to once more trust self to others	To acquire, assimilate and finally cast out the mentor
Career Consolidation	25–35		self deception about adequacy of marriage, and career choice	hard work on career consolidation		To make the grade (eg. tenure, partnership, V.P.)
Generativity (A second adolescence)	40–50		Middle years progress in maturation of adaptive modes Confrontation with one's instinctual reawakening A "ripening" period Mature acknowledgement of real life pains		Take others inside self Review of life style, career, marriage Struggle with feelings	Concern with next generation Interaction between middle-aged adolescent and teen-aged adolescent.

The timing, internal and external determinants and sequence of phases in adult development and especially of the mid-life period remain open questions. For example, with respect to the issue of determinants, Erikson (1959, 1963) states that the principle of epigenesis accounts for the prescribed sequential unfolding of inner laws of locomotor, sensory, and social capacities of the human organism. Each stage of development (over time) creates a succession of potentialities in the organism until all have arisen to form a functioning whole.

Neumann (1969) suggests that the changes in adult development come about through a progressive unfolding of archetypal constellations.

Neugarten's (1964, 1968) concept of the "social time clock" emphasizes the importance given to the timing of the social event, rather than its occurrence; i.e., the social time clock is superimposed on the biological and historical time frame, which produces an internalized expectation of the consensually validated sequence of major life events, including the "correct" time for such events to take place, such as marriage, birth of the first child, last child leaving home, and retirement. Gutmann's (1976) notion of a shift in the parental imperative particularly at mid-life can be added to this list.

Sheehy (1974) suggests that transitional stages, a reflection of adult developmental changes, receive their impetus from "inner crisis points" even though external marker events such as graduation, marriage, childbirth, and geographic moves are also times of change. If both the "inner crisis point" and the external event occur together, there may be an even greater feeling of disorientation and disruption resulting in greater struggle toward a new stage of stabilization.

The issue of the inevitability of phase-like sequencing is even more complicated. Clinically-oriented theorists such as Erikson, Neumann and Jung anchor on one end of the pole. For example, Erikson (1959, 1963) postulates that the inevitability of the human organism to progressively traverse all stages is due to the principle of epigenesis.

Neumann (1969) suggests the term, centroversion, to account for the sequential unfolding of the stages. Centroversion is the tendency, though unconscious, to work toward the formation of personality through progressively traversing each of the developmental stages.

Jung (1969) states that while there is a sequential unfolding of the stages of consciousness, there is not an inevitability associated with the completion of every stage (or state).

In agreement with Brim (1977), we question the accuracy and generalizability of such specific inevitable age boundaries on theoretical as well as methodological grounds. We believe that it is more appropriate to view a constellation of basic and fundamental biological, psycho-social and social themes and developmental tasks merging at some point during mid-life, covering a time span of anywhere from 5 to 20 years, beginning for some men and women in the early 30's and perhaps lasting for some into the late 50's.

Several theorists have attempted to summarize the essential developmental dilemmas and tasks of mid-life for men and women. The efforts by Brim (1977) and McCoy et al (1978) are noteworthy.

Brim, as a result of a critical review, summarizes the causes and tasks of male mid-life transitions as involving: 1) Adapting to biological and endocrine changes; 2) Assessing realistic work achievement and adjusting career aspirations usually downward to fit current realities; 3) Resurgence and reevaluation of the "DREAM" as conceptualized by Levinson including mourning unfulfilled aspects of the DREAM which must be given up; 4) Overcome potential stagnation and move toward true generativity and its accompanying sense of responsibility and interest in the development of the younger generation; 5) Confront death and one's mortality resulting in a shift to "time left to live", liberated energy and greater self acceptance; 6) Reassess primary family relationships including the recognition of one's limitations in molding one's child into an "ideal being" and the necessity of integrating the contrasexual opposite into one's personality and the husband-wife relationship--i.e. while a man is becoming more sensitive and nurturing, more interested in love than power, and more dependent, his wife is moving in the opposite direction--away from a nurturing position and away from dependency on her husband so that the husband's source of support and nurture is becoming more precarious at mid-life and this must be dealt with; and 7) Changes in social status and role which are "on-time or off-time" in Neugarten's terms with the latter or unanticipated change contributing maximally to the development of a mid-life crisis.

McCoy, et al (1978) have also attempted to summarize the major dilemmas faced by men and women around mid-life. Building on this effort, the works we have reviewed and our own preliminary research findings we have summarized the major identifiable and interrelated developmental tasks and dilemmas for mid-life men and women in Chart III below.

In summary, with respect to determinants, time boundaries, etc., we conclude that there is insufficient evidence for specific age-bound developmental stages in the mid-life period in which events, tasks, and personality changes must come in sequence. However, we do believe that there is a phase-like process to an extended mid-life transition and/or crisis, and that these phases are unique for men and women. The documentation and delineation of the phase-like nature of the mid-life period and the management of mid-life crisis remain two of the more interesting research questions. Also, in agreement with Erikson, Gutmann, Neumann, Jung, and others, we do believe that the quality and experience of the mid-life transition will be dramatically effected by the manner in which previous developmental stages and the related tasks have been mastered, traversed and integrated into the personality. It is also very clear that little is known about the contribution to the male and female mid-life experiences of individual differences in historical psychosocial predispositions, adaptive and coping strategies and the relative success or failure in managing prior adult transitions and developmental tasks.

Chart III

Major Developmental Tasks of Mid-Life

Developmental Task	Issues and Themes	Dilemmas for Men	Dilemmas for Women
Acceptance of death and mortality	Death becomes personalized in terms of death anxiety as parents and others become ill or die. Focus on "time left to live"	Struggle with meaning of death, mortality and life Sets stage for major reassessment of self, life, primary relationships, etc. to date, and vision and hope for second half of life Rework depressive position	
Accept biological limitations and health risks	Recognize bodily changes and meaning Shift in sex drive Greater vulnerability to stress and physical illness	Accept physical changes in form of flabbiness, fatigue, physical strength limitations and fluctuations in sex drive Increased vulnerability to stress and physical illness (heart attacks, stroke, hypertension, etc.)	Acknowledge and deal with changes in physical attractiveness Accept pre-menopausal and climateric imbalance and changes Deal with increased sexual interest, energy and fantasies as mid-aged spouse interest fluctuates; fantasies of outside relationships
Restructuring of sexual identity and self-concept	Integration of contrasexual opposite components of personality Re-emergence of struggle for individuation from early and current relationships and systems Reassess fit between current and projected needs for second half of life and reality of work role and personal identity	Recognize, experience and integrate emergent more passive, dependent, intimacy-oriented parts of personality Deal with residual mother-son ties and related fantasies and/or acting out in relation to older maternal and/or younger seductive women as part of integrative struggle Cope with spouse's moves toward greater personal, career, etc. individuation and autonomy	Recognize, experience and integrate emergent more independent, agressive, competitive parts of personality Reassess current housewife, work and/or career roles and possibilities given empty nest and increasing personal needs for autonomy and individuation Explore and deal with anxiety, guilt, fear and other early based disruptive feelings aroused by more aggressive, egocentric and autonomous wishes and moves

Chart III, cont'd.

		Re-evaluate work/career components of the Dream; including own achievement-striving and projection and recognition of what will be achieved and how high up one will progress Explore alternative types of work and/or career possibilities, particularly if current options are limited	particularly in relation to home, work, career and important primary relationships Deal with threat to spouse (who has become more needy and resentful of own neediness) caused by moves toward individuation and independence particularly in mid-life dual-career families
Reassess and restructure relationships to spouse, children and parents	Conflict between nuturance intimacy and individuation needs in husband-wife relationship	Struggle to achieve balance between needs for intimacy and to "be taken care of" by spouse/partner and growing individuation of spouse	Struggle to achieve balance and integration of emergent autonomous needs and spouse/partner's emergent intimacy and care-taking needs
	Empty nest and loss of close relationships to adolescent children as they begin to individuate	Children begin to leave, distance selves and differentiate at a time when father feels need for closer, more meaningful and intimate relationships; struggle to accept waning of influence over children	Empty nest demphasizes role of homemaker, mothering and signals search for meaningful alternative roles and commitments; preparation for possible widowhood or living alone
	Shift in relationship to parents	Need to deal with guilt as aging, ill and increasingly more dependent parents place son in decision-making/senior patriarch role	Aging or ill parents require daughter to become more maternal care-taker and to deal with ambivalence triggered by conflect with needs to individuate
		Potential illness and/or impending death offers the opportunity to balance books, integrate ambivalent feelings towards parents setting stage for anticipating grief; contributes to personalizing of death, death anxiety and a shift to a "time left to live" time perspective	

Chart III, cont'd.

Reorientation to work, career, creativity and achievement	Recognize realistic limitations and possibilities in work and career and explore alternatives	Reach or can see peak of career, reassess and give up parts of the Dream; fear of stagnation	Turn outward and experience new energy in relation to work, career, educational community or related opportunities Deal with anxiety and lack of information about how to get there as well as concerns about competence, lack of skill, etc.
	Intensification of attraction and preoccupation with fantasies of dramatic mid-career work or professional role change and/or geographic moves	Wish to magically resolve internal struggles, sense of stagnation by externalization in the form of dramatic and disruptive work/career or geographic shifts Turn more inward to family life and community service	Move into the educational, work or professional world exacerbates discrepancy between developmental status as mid-lifer and very junior or subordinate role or position (e.g., student, assistant professor, etc.) in the organization
	Concern with generativity, the "monument", the legacy to be left behind, the next generation	Beginnings of emergent generativity; need to realistically assess whether the "great book", program or other form of monument will ever be realized; interest in the next generation, youth and mentoring	Growing recognition for child rearers that children may be an important but insufficient legacy; exploration of alternative ways of leaving one's mark.

B. Are consistent and reliable general and gender-related shifts in personality and social orientation indentifiable during mid-life?

Clinical, cross-cultural, survey and other evidence suggest a major shift and gender reversal during the mid-life transition. One pattern which has been consistently noted is a change in focus from predominantly outward orientation to a more inward or reflective orientation for both mid-life men and women.

For example, Neugarten et al (1968) on the basis of their studies note that youth is characterized as outer directed more often than middle or old age, which are characterized as more inner directed. With increasing age there is an increasing saliency of inner life, an emphasis on introspection and stocktaking.

Levinson (1978), Jung C.G. (1969), Sheehy (1974), and Neumann (1959) similarly note that this reversal in the pattern of inward/outward focus occurs around mid-life with extraordinary implications for the remaining stages of adult development. Explanations for the shift are offered by Jung, Sheehy, and Neumann as a dynamic transformation of libido from the tasks of the first half of life (establishment of one's psychosocial identity within the social system) to the tasks of the second half of life (which include the integration of the parts of the self which were excluded from the personality in the formation of the psychosocial identity). Jung (1964) speaks of this shift in focus as the beginning of a psychological dis-identification of the ego with the persona (the psychological identity).

Sheehy (1974) states that this shift occurs in the stage of adult development called "Catch 30" in which there is a growing sense of the narrowness of the self.

Levinson (1978b) suggests that the shift from outer to inner directedness occurs around the mid-life transition (from the early to late 40's), and is a central feature of the questioning of one's current life structure. Emerging patterns occurring as a result of this mid-life shift from outer to inner directedness include: the tendency to recognize and integrate the contrasexual opposite (Gutmann, 1976; Jung, 1969; Sheehy, 1974; Levinson, 1978b; Neumann, 1969; and Neugarten et al 1968), and the need to alter the structure of the self through the integration of rejected parts in a move toward wholeness of the personality.

This parallels a second major shift concerning the sexual identity and self concept of males and females during mid-life, focusing the integration of more covert cross sex qualities into the personality. For example: Jung (1969), Wolff (1956), Neugarten et al (1964, 1968), Gutmann (1976), among others, speculate and

provide some empirical and clinical evidence that women tend to move toward greater instrumentality, integrating more autonomous, independent, competitive and agressive qualities into their personality while men tend to allow themselves to experience the more repressed or suppressed expressive, passive, dependent, intimacy related parts of their personality. The significance and importance of these developments, particularly for mid-life men was highlighted by the emergence of complex and differentiated pregnancy fantasies (e.g. give birth to a program, a book, a building, a plan) in some of the interviews we have conducted.

Levinson (1978b) states that one crucial issue of this phase of the mide-life struggle is the changing relation to the self. For men, this change is often proceeded by a flowering of fantasies about older maternal or younger more sexualized women.
Levinson suggests that these fantasies represent a developmental effort by the psyche, whose aim is to free the man from a more one-sided stereotypic masculine development of consciousness. Further, the goal is to free one's self more completely from the boy-mother relationship with the erotic transformative "feminine" as a means of healing old psychic wounds and of learning to love formerly devalued aspects of the self.

Similarly, Jungians (Jung, C.G. 1969; Wolff, 1956; and Neumann, 1959) postulate that the integration of the contrasexual opposite, the animus and anima, is a necessary prerequisite to further individuation of the personality. For the woman, the integration of the animus results in a more differentiated thinking function and consciousness. For the man, the integration of the Eros principle: the anima, brings a greater sense of relatedness.

Neugarten et al (1968) describe the issue of masculine and feminine role reversal in terms of dominance and submission. They state that with increasing age men and women reverse roles in terms of dominance and submission; i.e., men are seen as becoming less dominant, and more affiliative and nurturant, while women are seen as becoming more dominant, ego-centric and agressive, and less affiliative.

In conclusion, whether the language is Jungian or more socio-psychological, we believe that the emergence at mid-life, of more covert male and female qualities for the opposite sex is reasonably well documented. One testable hypothesis is that contemporary young women will exhibit greater instrumentality at a younger age, due to current social-historical changes in sex-role, heterosexual relationships and expectations. One additional aspect of this development, requiring further investigation, is the contribution of the male and male image to the

female's experience of mid-life. For example, Bardwick (1971, 1974) points to the significance of the father-daughter relationship in the foundation of the female identity pattern of affiliation.

Horney (1967) states that the masculinity complex of women can be accounted for in terms of societal favoritism accorded males in our society.

Neumann (1959) suggests that the formation of the female personality depends first on a relationship of primary identification with the mother, but later development centers on the integration of the animus and a relationship to the transpersonal aspect of the animus. Emma Jung (1969) similarly stresses the importance of the integration of the projected aspects of masculine for the psychological wholeness of the female personality.

Carl Jung (1969) further suggests that the role of the male is an important indicator of the intrapsychic character, attitudes, and disposition of the woman's animus; i.e., as it is revealed in projection the external figure of the man and his role is a reflection of the undeveloped (and hence, projected) aspect of the animus.

C. <u>What is the role of death, death anxiety, in changing perspectives on time and attitudes toward the second half of life during mid-life?</u>

For a number of theorists, the personal confrontation with death and related death-anxiety is central component of mid-life development for both men and women (Jaques, 1965; Neugarten et al, 1964, 1968; Levinson et al, 1978b).

For example, Neugarten et al (1968) state that for the Young Adult (20-30), life is seen as time since birth; however, by Maturity (30-40) life is seen as time until death. By Old Age (60+), the awareness of death serves as the impetus for new and final re-structuring. Neugarten notes that there is a personalization of death in the middle years, a recognition of one's own mortality which is experienced particularly by middle aged women as a rehearsal of widowhood.

Vaillant (1977a, 1977b) describes men in the final stage of development, Keepers of the Meanings vs. Rigidity (50+), as worried over the death of the spouse rather than their own deaths.

Levinson (1978b) suggests that the concern with one's mortality appears at an earlier stage; i.e., in the Mid-Life Transition (MLT) which spans the period from the early to the late forties. During these years, the man confronts and deals with the illusions of omnipotence.

Several theorists have emphasized that the final stage of adult development is one of acceptance of one's self mortality and life cycle (Erickson, 1959,1963; Sheehy, 1974; Jung,C. 1969; Gould,1972; and Levinson et al, 1976a,1978b). By implication, the failure to achieve an integrated sense of self acceptance can set the stage for later psychopathology and/or contribute directly to the development of selected symptoms and disorders.

D. What are the implications of the mid-life transition/crisis for psychopathology?

Some theorists have speculated about the unique implications of adult development theory in general, and of the mid-life crisis in particular for the emergence and treatment of various forms of psychopathology.

For example, Gutmann (1976) has attempted to link the emergence of bi-sexuality in mid-life men to various symptoms. He argues that male emerging passivity-dependence needs in mid-life may no longer be gratified by more autonomous, independent and assertive spouses or partners and that this can set the stage for husbands, so disposed, to develop alcoholic or psychosomatic symptoms, as a means of gratifying oral needs and/or of "being taken care of". In addition, he suggests, that the mid-age male, who leaves his wife for a younger, more seductive woman, may not be doing so, as a means of reaffirming his sexual potency, but as a way of reexternalizing the more passive components of his personality. Hence, he is searching for a more dependent, adoring younger female to participate in the denial of the emergent, more passive aspects of his passivity.

Kernberg (1978), in a more encouraging note, suggests that the mid-life narcissistic personality may be more ready at this stage for active treatment, than at any other period during his/her life.

Conclusions and Implications

The major conclusions and implications can be summarized as follows:

1. Methodological Considerations

a. Although several survey and quantitative studies have been carried out, the most influential and major work and theorizing in the area has been of a more clinical descriptive and qualitative nature. Though rich in insights which can be tested in a more systematic manner, sampling, data collection and other limitations suggest that the generalizability of these observations must be viewed with caution.

b. Observational, interview, self-assessment and projective test techniques are the most common data-gathering procedures in adult development and mid-life research. Although researchers such as Gould, Vaillant, Neugarten et al and Levinson use questionnaires or biographies, more empirical methods and designs have not been successfully adapted to the study of the complexity of the mid-life experience. This remains a persistent dilemma for the area of adult development in general.

c. Studies which have employed more systematic data collection techniques (e.g. interviews or projectives) often fail either to report or test the measurement characteristics (e.g. reliability, validity, etc.) of their instruments and/or their sampling procedures reflect systematic biases which limit generalizability. Studies generating baseline and normative data derived from more systematically drawn samples are clearly in order.

2. Theoretical and Empirical Consideration

a. There is some documentation (largely clinical or qualitative but not empirical) for the existence of a mid-life transition period extending from approximately 35-55 and lasting for as many as ten years which is of particular difficulty or stress for predominantly white middle class men. This does not imply that a similar period and related developmental struggle is bypassed by members of minority, other ethnic and social class groups. These remain to be identified and studied. A less well demarcated but equally stressfull transition phase for women can be identified in the studies reviewed. Basic and fundamental biological, psychosocial and social themes and developmental tasks

can be identified for this period, and their manifestations are somewhat different for men and women.

b. The related questions of the exact timing, sequencing and age boundaires of mid-life and other adult developmental phases remain ambiguous. Considerable progress has been made in identifying and understanding the major issues, themes and developmental tasks which bring on a mid-life transition and influence the manner in which this phase of development is experienced and worked through. The manner in which previous developmental tasks and phases were handled will similarly affect the course and experience of the mid-life transition/crisis.

c. Evidence (clinical, cross cultural, and survey) suggests a major shift in orientation by gender around mid-life (i.e. women move toward greater instrumentality, men toward more of the expressive pole.) Whether the language is Jungian or that of the social psychologist, the emergence at mid-life of the more covert male and female qualities for the opposite sex is generally agreed. One testable hypothesis is that contemporary young women will exhibit greater instrumentality at a younger age because of current social/historical changes in sex role and in hetero-sexual relationships and expectations.

d. More clinically oriented theorists tend to build their viewpoints upon the foundations laid by others, thus introducing considerable conceptual continuity. (e.g. Levinson is influenced by Erikson, who in turn pays tribute to Jung.)

e. An adult development viewpoint can contribute to our understanding of certain forms of psychopathology which are more frequent at mid-life. For example, several themes and developments for men and women and couples during mid-life (e.g. emergence of contrasexual opposite personality components such as passivity in men and autonomy needs in women) are potentially useful in contributing to our understanding of the high incidence of alcoholism and psychosomatic disorders arising in mid-aged men and of divorce for mid-aged couples. These and related concerns highlight the importance of taking into account individual differences in historically determined psychogenic predispositions, the availability of adaptive and coping strategies, life stresses, other developmental considerations, etc. to understand the quality, intensity and experience of mid-life for men and women.

3. Implications for Future Research

a. Much of the work in the area of mid-life development has been carried out with predominantly white, middle and upper class males. In addition to more systematic work on the mid-life development of women, additional baseline data on developmental variations by social class, ethnic and race differences as well as in clinical populations are called for.

b. Several questions about the role played by major social systems and organizational parameters, particularly in relation to female mid-life development, have emerged from our review. For example, the role of mentors for women in organizational life requires much further study. And, what about the sources of stress and coping patterns within the family system as its members engage in dual career situations? What is the appropriate strategy and timing for preventative interventions in relation to the above?

c. "The Dream" in Levinson's terms has been identified as an important developmental theme and componenet of the mid-life struggle for men. The female counterpart requires similar examination and its role in female adult development clarified. (This question is currently under investigation by our research team as part of a longer study of the adult development of women. One phase of this research involves the development of a systematic assessment package.)

d. Another question concerns the facilitative and/or disruptive contribution of partners of the opposite sex (e.g. husbands capacity to cope with and support wife) to the quality of coping during the mid-life transition as the process of sex role shifts, individuation and serious dual careers become more and more of a reality.

e. Finally, the recent and increasing trend for mid-life women to move into significant positions in academic, as well as the private and public sectors, suggests the need to identify and study off-time patterns involving discrepancies between personal or developmental time frames and career positions or organizational time tables. For example, who are the unique sources of stress and support for a mid-life female assistant professor who is expected to compete with younger and perhaps more energetic colleagues?

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Appendix A

Reference _____

Completeness Criteria	Criteria Not Appropriate	Completeness of Information		
		Yes	0	No
I. Data Collection				
1. Data collection techniques described				
2. Training procedures described				
3. Instrument reliability data reported				
4. Instrument validity data reported				
II. Sample				
5. Sample described				
6. Sampling techniques described				
7. Setting described				
III. Data Analyses & Presentation				
8. Data analyses & statistical procedures described				
9. Data (raw, transformed, reduced) presented in appropriate form (e.g., tables, etc.)				
IV. Theory/Hypotheses				
10. Theory clearly presented				
11. Hypotheses clearly stated				

Reference _____

Quality Criteria	Criteria Not Appropriate	Level of Adequacy		
		Yes	0	No
I. Sample				
1. Sample Size				
2. Composition sources				
II. Data Collection Procedures				
3. Appropriateness of data collection-instrumentation				
4. Pretest done if necessary				
5. Adequacy of training for data collectors				
6. Instruments reliable				
7. Instruments valid				
8. Data adequate for research questions				
III. Data Analysis				
9. Statistical procedures appropriate				
10. Findings are significant				
IV. Theory/Hypotheses				
11. Connection between theory & hypotheses logical & clear				
V. Implications/Conclusions				
12. Conclusions clearly supported by data				
13. Implications logical extension of findings				

Appendix B

Author Neugarten, Bernice

Reference Neugarten et al, Committee on Human Development, University of Chicago

Long series of research studies, starting in mid '50s, continuing to present

Methodology			Main Theoretical Propositions
Sample/Setting (Describe)	Data Collection Techniques and Instruments	Data Analysis and Design	
Over 2000 adults ages: 40 - 90 Normal, functioning adults, living in metropolitan communities in the Midwest.	Interview Projective		SOCIAL TIME CLOCK Concept which is superimposed on biological and historical time frame, which produces an internalized expectation of the consensually validated sequence of major life events, including the "correct"time for such events to take place (such as marriage, birth of the first child, last child leaving home,retirement.) Importance given to timing of event, rather than its occurance. Expectation of event allows planning and preparation and thus changes it from crisis to normal . Crisis event are the unanticipated. Middle age and old age groups give greater importance to being "off time" than do younger groups. INTERIORITY With increasing age there is an increased saliency of inner life, an emphasis on introspection and stocktaking. Youth is characterized as outer-directed more often than middle or old age, which are characterized as inner directed. Ego qualities in personality become more constricted, detached from the mastery of everyday events which preoccupy the younger person. Older groups seen less in control of impulse life.

CHANGE IN PATTERN In 1972 noted that women with higher levels of education seem to have a generally later pattern of family cycle events.

Neugarten Main Theoretical Positions contd.

PERSPECTIVE ON TIME Time for youth is measured in time since birth; cues for this are chronological age. For middle age and old age life is measured in time left to live, cues being career position, bodily changes, and family changes.

DOMINANCE-SUBMISSION With increasing age men and women reverse roles in terms of the dominance-submission issue. Men seen as becoming less dominant, more affiliative and nurturant. Women seen as becoming more dominant, ego centric and aggressive, less affiliative.

MENOPAUSE: EMPTY NEST Neither menopause nor empty nest are seen as crises by Neugarten.

PERSONALIZATION OF DEATH Middle age becomes the period when death becomes a reality. Issue for middle age women may be a rehearsal for widowhood; for middle age men, it may be the "sponsoring issue", i.e. the creation of social hiers.

AGE AS A VARIABLE Age is a variable when focus is on the intrapsychic process (those not readily available to ind. awareness, nor easily observed) Age is not a variable in analysis of individual differences re control of self and life situation, i.e., is not a variable in goal directed behavior.

STAGES OF ADULTHOOD Middle aged people have identified four stages of adulthood: young adult, maturity, middle age and old age.

There are five underlying dimensions: career line, health and vigor, family cycle, psychological attributes, social responsibilities.

CHANGING RHYTHM OF LIFE CYCLE. In 1966 reported a quickening of family events, women marrying earlier, having children at younger age, duration of marriage years extended, longer interval (15-17 years,) when husband/wife are only remaining family members.

Grandparenting younger; may mean more important role

Marriage no longer equals economic maturity. May be deferred for men (longer at school) but not for women

STAGES/TRANSITIONS

Stage Titles	Ages	Themes for Each Stage			Developmental Tasks for Each Stage		
		Biological	Psycho social	Systems	Biological	Psychosocial	Systems
Young Adult	20-30	Energy level congruent to opportunities in outer world	Life seen as time since birth	Outer directed			Social changes seen as possible
Maturity	30-40	Bodily changes	Life seen as time until death	Female: increase in dominance, assertion Male: increase in affiliation and nurturance	Energy increasingly directed toward inner satisfactions	Women: rehearsal for Widowhood	Men: "Sponsoring" issue; creation of social hiers
MIddle Age	40-60						
Old age	60 +	General slowing down	Reflection Less impulse control Constriction Interiority	Decrease in other-directedness		Awareness of death serves as impetus for new and final restructuring	Conformity, rather than social change takes priority

Sex Differences by Stage	Outcomes		
	+ Adaptive	- Pathological	+ - Perversion
Male increase in affiliation, nurturance with increasing age. assertion Female increase in xxxxxxx, ego-centric pattern. Become more outer directed. Less affiliative, nurturant.			
Female issue of middle age rehearsal for widowhood. Male issue of middle age is "sponsoring " issue.			
Young men, primacy of social demands over family YOung women, efforts to retain link between the two family systems, young and parental.			
Women seem to become more interested in issue of control as they age.			
Men in impulse expression.			
Middle age men, increase in use of abstract and cognitive processes Middle age women, increase in use of expressive, affective terms.			

Empirical Evidence		Research Needs/ Implications/ Questions	Clinical/Counseling Implications
Supportive	Contradictory		
		Need to document suggested trend toward postponment of family, life cycle events for highly educated women. Questions left open: Male development if female delays family pattern? Dual career patterns, differences, and impact on five underlying issues as identified in previous research, i.e., career line, health and vigor, family cycle, psychological attributes, social responsibilities.	(see next page)

Implications for Intervention Strategies by Stage	Interesting Conclusions - Additional Comments
Counseling may be required at these stages: Young woman experiencing ambivalence re career/family decisions , given the social time clock expectations. If the trend toward later marriages, etc. grows, could lead to individual anxieties in women whose earlier socialization still "expects" earlier timetable. Intervention may be required as older women feel newness and stangeness of emergent dominance, desire for control. Older men, shifting from dominant to nurturant, affiliative, may need help to become confortable with self and use new capacities. Since older populations express more importance to "correct" time of life events, may require counseling for "off time" events. Increasing introspection, Interiority, may re-awaken old anxieies, trauma, guilt. May need help to settle these issues.	